

October 1, 2004

CATALOGING POLICY AND SUPPORT OFFICE  
ANNUAL REPORT  
FY 2004  
(October 1, 2003 - September 30, 2004)

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Barbara B. Tillett, Chief  
CPSO

## INTRODUCTION

The Cataloging Policy and Support Office's mission is to provide leadership in the creation and implementation of cataloging policy within the Library of Congress and in the national and international library community; to support the effectiveness of the cataloging staff at the Library of Congress through guidance, advice on cataloging policy, and maintenance of bibliographic, authority, holdings, and classification records; and to develop and support national and international standards for structure and content of bibliographic, authority, holdings, and classification records through cooperative endeavors.

CPSO is the principal LC unit developing and maintaining cataloging policies and resulting documentation, including the *Library of Congress Rule Interpretations*, *Library of Congress Classification Schedules*, *Library of Congress Subject Headings*, and related manuals. CPSO is also the principal LC unit responding to error reports and answering queries from within and outside the Library about Library of Congress policies related to descriptive and subject cataloging, LC classification, MARC content designation, transliteration schemes, and policies regarding authority, bibliographic, holdings, and item records in the LC ILS (integrated library system). The chief, assistant chief, team leaders, and policy specialists are the main respondents. Staff in the Subject Heading Editorial Team (SHED), the Classification Editorial Team (CLED), and the PREMARC/Quality Control and File Management (QCFM) Team are also involved in responding to the error reports.

## **THIS YEAR'S HIGHLIGHTS**

### **International Developments**

**JSC.** CPSO has been highly visible in the Joint Steering Committee for Revision of the Anglo-American Cataloguing Rules (JSC) and the International Federation of Library Associations (IFLA). As LC's representative to the JSC, CPSO's chief, assisted by descriptive cataloging specialists, prepared documents for the semi-annual meetings, disseminated information within LC about JSC activities, solicited comments from LC staff about proposals before the JSC in order to formulate LC's official response to them, and planned the future development of AACR, which includes a third edition projected for 2007.

**IFLA.** In IFLA, the chief's work has been principally in the areas of Functional Requirements for Bibliographic Records (FRBR), Functional Requirements for Authority Numbers and Records (FRANAR), the Virtual International Authority File (VIAF), a Statement of International Cataloguing Principles, and an International Cataloguing Code (a code for code makers). Her activities in IFLA led to invitations to the chief to speak and consult this year in the library community world-wide, including the United States, Europe, Asia, and South America. That FRBR is now being incorporated into the development of AACR and other major cataloging codes worldwide has prompted examination of its potential usefulness to future systems designs. The conceptual model represented by FRBR is also being extended to authority control, and the chief has been actively involved in that process.

**IME ICC.** Last year IFLA began sponsorship of a series of world regional International Meetings of Experts on an International Cataloging Code (IME ICC), to explore similarities and differences in

current national and regional cataloging rules in an attempt clarify where variations for languages and cultural differences may be needed and where rules might be the same. The goal of the meetings is to increase the ability to share cataloging information worldwide by promoting standards for the content of bibliographic and authority records used in library catalogs. The first meeting was held in Frankfurt, Germany in 2003 for experts from Europe and North America. This year the second meeting took place in Buenos Aires, where Latin American and Caribbean experts met at the Universidad de San Andrés prior to the IFLA conference in Buenos Aires. CPSO's chief chaired the planning committee and helped moderate the meeting. There were 32 participants, including representatives from 14 countries and an additional 6 planning committee members (adding 4 more countries). Plans also began for the 2005 meeting for Arabic-speaking countries in the Middle East, and contacts were made with the Bibliotheca Alexandrina in Alexandria, Egypt, possibly to host it. The chief also met with staff from the National Library of Korea in Seoul, host of the meeting in 2006 for experts from Asia. Contacts were also made toward the 2007 meeting in Durban, South Africa..

**LCC law schedules.** Since completion last fiscal year of the law schedules as originally envisioned, the influence around the world of that monumental accomplishment has continued to grow as more and more libraries have begun to reclassify their law holdings or plan such projects. CPSO's law classification specialist, assisted by various other LC staff members, has provided instruction to a wide number of LC and external constituencies in use of the newest schedules (religious law). This year new initiatives emerged for additional schedules, one for law of the indigenous peoples of North America, research for which began, and another for Islamic law, possibly BPI, a schedule that could be paired with KPB in the manner of BM and KBM for

Jewish law.

**Digitization of rare law materials.** Continuing a project begun last year, CPSO's law classification specialist remained among the prime movers to make available on the World Wide Web digitized versions of rare and important law materials, of which LC's extraordinarily rich holdings in both the Law Library of Congress and the Rare Books Division are only now becoming known. Library participants who provide the bibliographic resources to be digitized also raise the money to finance the digitization.

**LEAF.** In May, the chief travelled to Berlin, Germany to the final round table workshop of LEAF (Linking and Exploring Authority Files), a three-year project of the EU of which LC has been an "observer" for several years. Now finishing, the project focused on authority files in archives, but considered interoperating with library authority files. This project is one among several being developed to enable the exchange of authority data among repositories throughout the world.

### **Local Developments**

Outreach of another type occurs in the service of CPSO staff as instructors for courses in aspects of cataloging and classification, which they teach at LC and at institutions and meetings throughout the United States and often abroad. They themselves develop the classes they teach, which include a standard range of courses repeated several times each year. Courses are prompted by new cataloging developments that must be taught widely, and customized courses in response to requests from LC staff. Several new courses were introduced this year to an already rich number of offerings. Some classes are now available in more than one version, length, or level. And instruction was offered frequently, with the result that some policy specialists spent a substantial amount of time in the classroom.

## **New Directions**

**ClassWeb maps.** CPSO announced an enhancement to Class Web in which maps that are included in the printed edition of Class G became available online using digitized color versions of them provided by G&M. The maps were posted to the CPSO Web site and 133 links to them made at appropriate locations throughout the G schedule (G1000, G2200, G2080, G3700, G4060, etc.). CPSO and G&M have received a number of inquiries in the last few years from map and atlas catalogers about the possibility of having these maps available online, and this enhancement was in response to that interest.

**Data base improvement.** On June 28, 2004 CPSO began a one-year pilot project for a Database Improvement Unit (DBIU) to develop, analyze, and document maintenance procedures for the online catalog. The unit will correct authority, bibliographic, holdings, and item records, and develop procedures and streamline operations for the maintenance of the bibliographic and authority databases. Under the direction of the SHED team leader, staff for the pilot will consist of people on 3 series of NTE 120-day details, each of at least three GS-1410-12/13 catalogers and one GS-1411-9 or incumbent 10 or 11 cataloging technician. The first series of detailees made extraordinary progress and created procedural documentation to assist future staff.

Expanding CPSO's ability to do file maintenance of another kind, the SHED team leader and four policy specialists received basic training to update records in RLIN, which they will use to update roman script data in JACKPHY records that come to their attention during their regular work. Each person was given an individual account. Up to now such records had to be sent to RCCD, so this will free up the RCCD staff time and assures faster response to the reported errors.

**Laval-RAMEAU-LCSH.** At the IFLA conference in August plans were codified to establish formal collaboration among the maintenance agencies in the U.S., Canada, and France that provide subject systems based on LCSH. The Université Laval (Canada; Répertoire des vedettes matière) and RAMEAU (France; Répertoire d'autorité-matière encyclopédique, alphabétique, unifié) will send corrections for LCSH records and the Subject Cataloging Manual: Subject Headings directly to CPSO and will submit proposals for new LCSH terms based on French publications. CPSO will explore developing a workflow, should that be necessary. Regular email exchanges will begin to keep each other updated on activities. LC will receive the URLs, IDs, and passwords for the Laval and RAMEAU databases. Both agencies already use LCSH online.

**053 Project.** In conjunction with Music and Sound Recordings Teams I and II in SMCD, CPSO began a pilot project to test adding Library of Congress Classification (LCC) information for biographies and biographical/critical works in the field of music to name authority records for individuals and corporate bodies. Classes for that material are in the range ML410-ML429, and are specific to individuals and corporate entities in different activities, such as composers, performers, theoreticians, and instrument makers. The advantages of including these 053 fields are that they will save cataloging time, not only for LC catalogers, but for other libraries that capture information for the authority records, they resolve problems of duplicate cutters or even duplicate classes that may have been used for a person or group over the more than 100 years that class M has been in existence, and they can be used as links from the class number in the authority record to the online shelflist. CPSO's music policy specialist concentrated on authority records for materials previously cataloged, while SMCD implemented the 053 field

only for newly cataloged materials classified in the eligible classes and for which name authority records had to be created. During period of the pilot, name authority records with these 053 fields were distributed.

### **OVERVIEW OF ACTIVITIES**

CPSO represents the Library in various international and national cataloging and metadata policy bodies and professional organizations, collaborates in the creation and revision of cataloging standards, promotes the maintenance of standards by offering continuing education, and reports to colleagues and sister organizations and institutions on Library of Congress cataloging activities. In terms of the visibility of CPSO's involvement, the most important among the organizations where CPSO officially represents LC are the JSC, the IFLA Cataloguing Section, the IFLA Classification & Indexing Section, the IFLA Division IV: Bibliographic Control, several sections or committees in the American Library Association (ALA) and the American Association of Law Libraries (AALL), and the United States Board on Geographic Names Domestic Names Committee. The professional organizations and other groups in which staff served were:

- American Association of Law Libraries
  - AALL Publications Series (development of a handbook on using LCC class K)
- American Indian Caucus
- Collaborative project to digitize significant rare law materials
- Education Committee Legal History and Rare Book Special Interest Section
- Foreign, Comparative and International Law Special Interest Group
- Education Committee
- Long-Range Planning Committee
- Roundtable for Head Catalogers at Large Libraries
- Roundtable for Heads of Technical Services
- Technical Services Special Interest Group
- Member-at-Large, Executive Board
- Standing Committee on Cataloging and Classification
- Tribal Law Collaborative Collection Development Round Table
- American Library Association (ALA)



- ALA/AACR Consistency in Part I Task Force
- ALCTS CCS Nominating Committee
- ALCTS/SAC-PCC/SCT Joint Initiative on Subject Training Materials
- Committee on Cataloging: Description and Access (CC:DA; LC representative)
  - Task Force on Consistency across Part I of AACR2
  - Format Variations Working Group Implementation Group
- MARBI
  - Subject Analysis Committee (LC representative)
    - Subcommittee on Fiction Cataloging Guidelines
    - Subcommittee on Reference Structure
    - Subcommittee on Semantic Interoperability
    - Subcommittee on Training
- CONSER Cataloging Manual* revision committee
- Council on Geographic Name Authorities
- Dublin Core Working Group on Agents (authority control metadata on the World Wide Web; linking national authority files)
- IME ICC (IFLA Meeting of Experts on an International Cataloguing Code)
  - Second IFLA Meeting of Experts on an International Cataloguing Code, Buenos Aires, Argentina (chair, planning committee; conference moderator)
  - Planning of future meetings (for Middle Eastern, Asian, and African experts)
- IFLA (International Federation of Library Associations; annual conference in Buenos Aires and special meetings in The Hague and Paris)
  - Cataloguing Section Standing Committee (LC representative; secretary)
    - Working Group on the Use of Metadata Schemas
  - Classification and Indexing Section Standing Committee (LC representative; secretary/treasurer)
  - Division IV: Bibliographic Control (chair/treasurer)
    - Coordinating Board (incoming chair, 2003/04)
  - FRANAR (Functional Requirements and Numbering of Authority Records Working Group)
  - FRBR Review Group
  - FRBR Working Group on Continuing Resources
  - FRBR Working Group on Expressions
  - Governing Board
  - ISBD Series Study Group
  - Professional Committee
  - Publications Committee
- JSC (LC representative)
- Music Library Association (MLA)
  - Joint MLA/UMCP Committee on the MLA Archives
  - Subject Access Subcommittee
- NISO Thesaurus Revision Advisory Group (revision of ANSI/NISO Z39.19)
- OCLC
  - Faceted Application of Subject Terminology Task Group
  - Research Advisory Committee
- PCC (Program for Cooperative Cataloging)
  - BIBCO Operations Committee
  - CONSER Operations Committee
  - Standing Committee on Standards
    - Task Group on Conference Publications
  - Standing Committee on Training

Group to revise documentation and SCCTP course for  
integrating resources (chair)  
United States Board on Geographic Names Domestic Names Committee  
(LC representative; chair)  
VIAF (Virtual International Authority File) (Die Deutsche  
Bibliothek/OCLC/LC Joint Personal Name Authority Proof of  
Concept Project)

CPSO staff also served as official and informal consultants to many  
organizations, sometimes carrying out their responsibilities away from  
the Library, and sometimes by meeting with visitors to LC. This year  
staff collaborated with representatives from:

12<sup>th</sup> International Congress of Medieval Canon Law (Rosenwald Room  
exhibit of LC law rarities)  
ALA Publishing (reviewers, *AACR2 2004 Update* and its index;  
*Concise AACR2* and its index)  
BIBCO  
*BIBCO Cataloging Manual* (reviewers of revision; draft of new  
module on integrating resources)  
British Library (FRANAR and InterParty authority control; IFLA  
and JSC business)  
*Cartographic Materials: a Manual of Interpretation for AACR2*.  
rev. ed. (reviewer)  
CONSER  
*CONSER Editing Guide* (reviewer of revision)  
*CONSER Cataloging Manual* (new module on cataloging remote  
access electronic resources)  
Summit on future needs for bibliographic and holdings data for  
managing electronic serials  
Updated LC records (in OCLC) that are not returned to LC  
Council on East Asian Libraries (CJK Manual of Examples to  
supplement AACR2)  
Danish Bibliographic Centre (cataloging policy - also later ONE  
and ONE SAC)  
Department of Defense Document Automation & Production Service  
(analysis of LC office equipment)  
Deutsche Bibliothek (on the VIAF project and FRBR workshop)  
Endeca (clustered search engine - regarding application to  
faceted subject searching and front end of bibliographic and  
authority databases)  
Harvard Islamic Legal Studies Program (review of new KPB Islamic  
law)  
Harvard Islamic Finance Information Program (review of new KPB  
Islamic law)  
Harvard Widener Library Middle East division and Harvard Law  
School library (KPB; KBM/BM Jewish law)  
Hawaiian Historical Society (relevant LC law holdings; plans for  
LCC schedule for Hawaiian law; cataloging and subject access)  
International Association of Music Libraries (draft of charge to  
working group for exchange of authority data about musical  
works)  
ISBD standards (reviews of drafts of revised ISBD(ER), ISBD(G);  
planning for review of ISBD(PM))

ISO Joint Advisory Committee for ISO 639, Language Codes  
 JSC (LC responses to documents and responses from other members;  
 reviewer of drafts of *AACR2 2004 Update* and its index, *Concise AACR2* and Index)  
 Law Library Microform/Digital Consortium, Inc. (digitizing law of indigenous peoples)  
 Library and Education Assistance Foundation for Vietnam (workshop for librarians in Vietnam)  
 Michigan State University, East Lansing (doctoral student)  
 National Library Board of Singapore (subject metadata in a multilingual environment)  
 National Library of Canada/Bibliothèque nationale du Canada (later named Library and Archives Canada) (consultation with senior managers)  
 National Library of Norway (CPSO)  
 OCLC  
     FAST research team  
     VIAF  
     Office of Research  
     Research Advisory Committee  
 ONE and ONE SAC (Danish and Swedish-based utility exploring new approaches to providing a union catalog and union authority file)  
 Research Libraries Group (Unicode implementation; normalization; treatment of holdings information in the new client system; RedLightGreen development)  
 Serials Cataloging Cooperative Training Program (reviewer of course on integrating resources prepared at the University of Wisconsin, Milwaukee )  
 University of California, Berkeley, Native American collections (classification of American Indian law)  
 University of Kelaniya Library, Sri Lanka (CPSO)  
 Victoria (Australia) Association of Library Automation (FRBR, VIAF, Unicode implications for authority control)  
 Yemen Ministry of Foreign Affairs, Director of Information and Documentation (LC collections and services; LCSH indexing; LCC)

Within the Library, CPSO staff members were consulted by or collaborated with colleagues outside CPSO on a broad range of topics and activities, including:

Americal Folklife Center (recent bibliographic records for special collections; Veterans History Project)  
 APLO (bibliographic, holdings, and item records for in-analytic records)  
 Acquisitions Directorate (explorations into vendor supplied bibliographic records)  
 Cataloging Directorate management (OCLC's FAST project)  
 Cataloging Management Team, Cataloging Policy Advisory Group (OCLC's FAST project)  
 CDS (enhancement of Classification Web with maps; review of Catalogers Desktop; review of *2004 AACR2 Update* and its index in *Catalogers Desktop*)  
 Children's Literature Team (headings for botany and zoology)  
 Copyright Office (tag tables in Voyager)  
 Geography and Map Division (form/genre headings for cartographic

materials)  
 History and Literature Cataloging Division (biography classified in CT; cataloging of African materials)  
 Human Resources Office (job analysis panel)  
 ILS Program Office (item record data dictionary; documentation to record enumeration and chronology in item records; creating holdings and item records for supplements and indexes)  
 Law Library (collaboration for new publication, "Illustrated Guide to the Law in the LC Collections"; additions to LC's *Standard Citation forms for Rare Book Cataloging*)  
 Middle East/North African Team (revision of romanization table for Kurdish)  
 LC's Minerva Web site (subject access)  
 Motion Picture, Broadcasting and Recorded Sound (conversion of series decisions card file)  
 Music Division (online schedule displays and tables in revised class M)  
 Office of Strategic Initiatives (digital life cycle framework)  
 PCC (series training)  
 Prints & Photographs Division (cataloging of born-digital and computer-generated pictures)  
 RCCD (headings for orientalists; pinyin romanization of personal name and geographic elements in complex headings)  
 Cooperative Cataloging Team (SACO)  
 Arabic and Hebraica Teams (Unicode implementation; RLIN 21 issues)  
 Romance Languages Team (non-analysis of monographic series)  
 Science, Technology, and Business Division (processing technical reports series)  
 Serial Record Division (cataloging of comic books, comic strips, graphic novels, etc.; serial inventory matters; Arabic serials cataloging on OCLC/automatic transliteration)  
 Strategic Workflow Initiatives Group (subject headings proposal and editorial process)

Within the Library, CPSO staff sat on various Cataloging Directorate and Library Services committees and official units. These include:

ASCD (headings for Netherlandish art)  
 Baseline Inventory Program (co-manager)  
 Catalogers Reference Collection Steering Committee (chair)  
 Cataloging Directorate  
     Strategic Plan, Work Group 2 (Processing Rules Analysis Group), Goal 4, subgroup 2 (chair)  
 Cataloging Management Team (later called Bibliographic Access Management Team)  
 CPSO and ILS Documentation Revision Group  
 Data Policy Group (chair)  
 Digital Strategies Technical Review Committee (review of digital projects proposed by Library Services)  
 ECIP (administrator/liaison for CPSO)  
 Emergency Evacuation Team (floor warden, back-up floor warden, zone monitors, stairway monitors, disability monitor, office emergency contacts; organized team members for all units on 3<sup>rd</sup> floor Adams Building)  
 Emergency Management Team  
 HLCD (subject cataloging of serials in African languages and literature)

ILS Program (policy committee for decisions about holdings and item records)  
Joint Interest Group for Processing of Serials in the Copyright Office  
*LC Cataloging Newsline* (editor; reporter from CPSO)  
LC Cataloging Workflow and Organization Joint Issue Group, LS-Copyright Business Process Improvement  
LC MARC Review Group  
Little Loaders  
Music Cataloging Advisory Group (chair)  
NLS/BPH (their Voyager database)  
Portals Applications Issues Group  
Serial Record/CPSO Bibliographic Issues Group  
Serials Control and Inventory Management Subcommittee  
Serials LCRI Group  
Shelflist Re-location Ad Hoc Working Group  
Strategic Workflow Initiatives Group  
Voyager "locations summit" for materials being moved to Fort Meade

### **DESCRIPTIVE CATALOGING**

**JSC.** The increased pace of activity in the JSC required descriptive specialists to devote a significant portion of their time to fulfilling the Library's responsibilities within this international body. CPSO's work concerns not just official representation of LC, but the development, drafting, and review with catalogers at LC of the sections of AACR2 that are under discussion. That work extends to the implementation of AACR2 at LC, which inevitably involves the Library of Congress Rule Interpretations (LCRIs). Among the major tasks that occupied CPSO was preparation of drafts for chapters and other sections of AACR2, including such issues as incorporation of FRBR concepts and terminology, consistency across the chapters of Part I and the restructuring of Part I, use of conventional terminology for physical description of non-book materials, electronic resources, continuing resources, and incorporation of authority control. CPSO staff also proofread the entire 2004 revision of AACR2 (*2004 AACR2 Update*) and its index and the *2004 Concise AACR2* and index, and wrote LCRIs and relevant training materials (and gave training in some cases) so that LC cataloging staff would be properly prepared to

implement the 2004 updates.

**IFLA.** The participation of CPSO in descriptive cataloging activities within IFLA is influential and visible. CPSO's principle IFLA activities are summarized near the beginning of this report, and the specific units in which CPSO is active are listed in the Overview of Activities section in this report.

## **SUBJECT CATALOGING**

**Subject Heading Editorial Team (SHED).** SHED maintains the Library of Congress Subject Headings (LCSH) database, prepares the Tentative Weekly Lists of proposals for new and revised subject headings, and prepares the annual printed edition of *LCSH* that is published by CDS. This year SHED managed to keep current with incoming proposals in spite of having only two assistant editors, down from the normal staff of 4. Over 6,200 new proposals were processed, and 6,000 records corrected, a total of over 12,200 transactions for the year. The size of the subject headings database is now 283,500 records.

The team continued to make changes to its workflow and staff assignments in order to complete its work within required deadlines and avoid falling behind. Regrettably, when team members were on vacation, it became necessary when proofreading new and revised authority records to suspend proofing of some fields that are not access points in order to produce the Tentative Weekly Lists in a timely manner.

Team members were trained to revise LC bibliographic records in the RLIN database (primarily JACKPHY records), a capability that significantly improved efficiency and turnaround time by enabling them to correct records themselves instead of sending them to other cataloging divisions as additional work for staff not primarily responsible for database maintenance.

The annual printed edition of *LCSH* (27<sup>th</sup> ed.) was produced on time and was distributed to staff in May.

Selected BatchCat headings changed:

<b>Old Heading</b>	<b>New Heading</b>	<b>Records changed</b>
Industry and state	Industrial policy	1,462

Cities and towns \$x Planning	City planning	2,000+
Hygiene, Public	Public health	900+

**Classification Editorial Team (CLED).** CLED maintains the Minaret database for the Library of Congress Classification (LCC) scheme, acting as the technical experts who implement schedule developments and revisions received and approved by CPSO from the libraries worldwide where LCC is used. Team members create and revise the MARC classification records from which the online schedule display and the printed schedules are drawn, and prepare the Tentative Weekly Lists of proposals for new classes and revisions to current classes that are submitted for review. This year, working with CPSO senior policy specialists, CLED produced revisions to schedules KB Religious legal systems that include KB Religious law in general; Comparative religious law; KBM Jewish law; KBP Islamic law; and the expanded and revised KBR/KBU Canon law. Inputting of a new edition of class M began.

#### **DATABASE MAINTENANCE**

**Database Improvement Unit (DBIU).** The SHED Editor (team leader) volunteered to supervise a Database Improvement Unit pilot project, which began on June 28. The first of three successive groups of detailees, catalogers Lucas Graves, Antoinette O'Bryant, and Seanna Tsung, and technician Marilyn Hargreaves, quickly grasped the procedures for correcting records using BatchCat, a software package for rapid correction of designated fields and subfields in MARC 21 records developed outside of LC that LC has modified. In addition to 138,000 records corrected primarily using BatchCat, individual records were also corrected. The average number of records corrected in 60 work days is an impressive 2,300 records per day. With each month of



their details the catalogers increased their speed, from 30,000 records in July to 63,000 records in September.

As another part of the DBIU pilot project, the members of the DBIU team wrote two documents, one that describes the methods for using BatchCat, and the second for making corrections to descriptive headings (e.g. Argentine Republic TO Argentina; Rumania TO Romania; Porto Rico TO Puerto Rico). These documents will be the basis for instructing future detailees to the pilot.

**PREMARC/Quality Control and File Management Team.** While policy specialists continually upgrade bibliographic records as they do their other work, specific responsibility for bibliographic file maintenance lies with the PREMARC/Quality Control and File Management Team. They are the ones who modify thousands of bibliographic records to rectify problems detected by means of machine-generated error reports, who make modifications in advance so that no errors will prevent proper import and export of records, and who correct access points in large sets of bibliographic records after headings have been changed. They undertake projects for staff throughout the Cataloging Directorate and occasionally for processing sections in the custodial divisions.

This year, the team devoted most of its time adding bibliographic records to the database in conjunction with record-not-on-file situations identified by the Baseline Inventory Program (BIP). The team's role was to upgrade online records for books identified by BIP as "not being on file." Various levels of inputting were required, depending on the state of the individual online records available for team members to work with, and whether or not there existed shelflist cards to provide additional information. Other complexities of the work included adding an "LTF" control number (the printed card did not have a standard LCCN and the cataloging data was less than full) to the 010 field of records that lacked a valid LCCN, resolving duplicate

LCCNs when there were either several records for the same book or more than one LCCN in a single record, and collaborating with language specialists outside CPSO to romanize records whose cataloging data was not already romanized. In order to fulfill their BIP responsibilities and input almost all cataloging data found on the source card, the team had to re-learn, after 12 years, older MARC editorial conventions and content designation guidelines that are no longer in use. This required them to spend a significant amount of project time at the review level. Two of the team's verifiers have been working full-time for BIP for more than a year doing problem resolution and quality assurance.

The team continued its regular database maintenance work, making corrections received from various sources around the Library, the United States, and foreign countries; responding to CDS error reports; and responding to RLIN conflicts and duplicates reports.

### **TEACHING AND PRESENTATIONS**

Outreach represents a major aspect of CPSO's mandate. Staff regularly provide workshops, courses, classes, and customized instruction not only inside LC, but to professionals from throughout the United States and well beyond. Major outreach activities are summarized at the beginning in this report, and outreach efforts are integral to some of the activities mentioned in other sections. Below are listed specific presentations and recipients of instruction provided by CPSO staff that do not fall under any of those other rubrics.

#### **Papers, Panels, Reports, etc.**

- American Association of Law Libraries (AACR3 plans; Islamic Law in the 21<sup>st</sup> century)
- Standing Committee on Cataloging and Classification (Technical Services SIS) (current LC thinking on simplification in cataloging and classification)
- American Library Association
  - ACIG (LITA/ALCTS CCS Authority Control in the Online Environment Interest Group) annual program, FAST, Slow and

Z39.19: Emerging Trends in Subject Authority Control (AACIG Past and Future)  
 ACRL Slavic and East European Section/ALCTS Committee on Cataloging: Asian and African Materials (Library Catalogs and Non-Roman Scripts: Development and Implementation of Unicode for Cataloging and Public Access)  
 ALCTS President's Reception (Lubetzky Memorial speaker)  
 ALCTS (Library Catalogs and Non-Roman Scripts) program (Multi-Script Decisions for Cataloging Policy at the Library of Congress)  
 ALCTS Serials Section, Committee to Study Serials Cataloging and CC:DA (plans for AACR3)  
 BIBCO-At-Large session, Orlando (integrating resources, AACR2 2004 Update; AACR3)  
 CC:DA (Functional Requirements of Bibliographic Records)  
 CC:DA/MARBI Preconference on FRBR (FRBR Basics)  
 International Relations Committee (IFLA governing board)  
 Library of Congress Conference 2000 Action Plan Forum (gaining bibliographic control of electronic resources)  
 Library of Congress/RUSA Forum (gaining bibliographic control of electronic resources)  
 LC's semi-annual exhibit (LCSH)  
 U.S. Associations Directors (IFLA governing board)  
 Australian Committee on Cataloguing Seminar on FRBR (Revolution or Evolution: The Impact of FRBR)  
 CPSO Information Forum (JSC Ottawa meeting)  
 IME ICC (Second IFLA Meeting of Experts on an International Cataloging Code, Buenos Aires, Argentina, and reports to IFLA on the Buenos Aires meeting)  
 International Library Information and Analytical Center (ILIAC), 6<sup>th</sup> International Workshop "Digital Resources and International Information Exchange: East-West" (Worldwide Linking of Controlled Vocabularies - focus on Russian and US activities)  
 Islamic Legal Studies Program/Harvard Law School Working Committee on the KBP draft Islamic law schedule and form tables  
 OCLC Research Advisory Committee (FRBR and the MARC 21 format)  
 VTLS Users Group meeting (FRBR)

**Courses, Workshops, and Other Instruction Given by CPSO Staff to Personnel from Other Libraries**

American Association of Law Libraries advanced cataloging workshop (class K)  
 ARDA/NRCC Workshop on Large Scale Concept Ontology for Multimedia Understanding (LCSH)  
 Bureau of Reclamation and Bureau of Land Management library, Denver, CO (LCC and LCSH workshops)  
 Catholic Library Association and National Catholic Educational Association (new law schedules)  
 Chinese American Librarians Association, Mid-Atlantic Chapter (FRBR)  
 German librarians (FRBR workshop, Frankfurt, Germany)  
 Law Librarians' Society of Washington, D.C. (AACR2 2002 Revision for serials and integrating resources)  
 Middle East Librarians Association conference, Washington, D.C. (KBP Islamic law; Classification Web)  
 Music Library Association (LCSH for music librarians)  
 Oregon Library Association (LCC workshop)  
 Program for Cooperative Cataloging

BIBCO

General instruction: Impact of AACR2 2002 Revision on cataloging of monographs and integrating resources

Meeting: FRBR

Stanford University (KPB Islamic law; Classification Web)

University of California, Berkeley (KBM Jewish law; KBP Islamic law; NACO series training)

University of Tennessee, Knoxville, library (2-day LCSH workshop)

Wisconsin Library System (WiLS) (workshop on "Cataloging Near and Far: International Activities in Cataloging: FRBR, VIAF, IME ICC")

**Courses, Workshops and Other Instruction Given by CPSO Staff to LC Staff**

The 2002 Revision of AACR2

AACR2 briefings

To initiate discussions for LC responses to issues pending

To report on JSC meetings and decisions

CPSO Information Forums (reports from JSC meetings; other international initiatives)

Holdings and item records

Leadership Development Program orientation

Team Leaders Forum (FRBR, VIAF)

Numerous instructional sessions arranged by request of individuals and small *ad hoc* groups

Ongoing (office hours) in the Madison Building by CPSO policy specialists

**Standard Courses Given by CPSO Staff to LC and PCC Staff:**

**TPAIO (DBI)**

Baseline Inventory Project

Basic Shelflisting

Catalogers Desktop

Classification Web

Classification workshops

ILS SkillBuilders series

LCC in Minaret

Shelflisting I (21 hours)

Subject cataloging workshops series

Voyager 2000

Web OPAC

**Other**

Advanced Serials Cataloging (Course in CONSER Serials Cataloging Cooperative Training Program)

Impact of changes in the 2002 Revision of AACR2 on the cataloging and updating of loose-leaves at LC

Implementing the new religious law schedules

NACO series authorities training

PCC series training (6 half-days)

SACO workshops (proposing geographic headings, headings for fine and decorative arts, headings for languages and literatures)

Serials Cataloging Workshop

Series for Technicians

Series Institute (3 days)

Series Problem-Solving Seminar (new; 2 day)

Series Training (2 day; for technicians)

Series Workshop (2 day; for librarians)

Subject Analysis Workshops  
Train the Series Trainer Workshop (new; 1 day)

### PROJECTS AND ACTIVITIES

The wide variety of activities in CPSO included projects of limited duration as well as continuing responsibilities. This year's activities included:

- Classification of calligraphy
- Cooperative project to digitize rare law materials and American Indian law materials
- Coordination to improve bibliographic control of LC rare law materials
- Handling changes in mode of issuance; the impact of such changes on distribution of catalog records
- History and Literature Cataloging Division: assistance in cataloging of African literature and language serials
- ILS supplement to the *Subject Cataloging Manual: Shelflisting* ISSN (possibility of expressing physical medium)
- Preparation of a new edition of Class M
- Revision of MARC 21 subfield coding for certain data in music uniform titles
- Revision of subject headings for battles (completion of 2-year project)

### PUBLICATIONS BY INDIVIDUAL STAFF MEMBERS

Geraldine Ostrove

"Recent Publications in Music," *Fontes artis musicae*, 49/4 (Oct.-Dec. 2002), p. 215-270.

Barbara B. Tillett

*Authority Control*: Definizione ed esperienze internazionali, atti del convegno internazionale, Firenze, 10-12 febbraio 2003, a cura di Mauro Guerrini e Barbara B. Tillett, con la collaborazione di Lucia Sardo. Firenze: Firenze University Press; Roma: Associazione italiana biblioteche, 2003. Also available as:

<<http://digital.casalini.it/fulltext/is.asp?isbn=888453111X>>

"Authority Control: Stato dell'arte e nuove prospettive," Barbara B. Tillett. In *Authority Control*. Firenze: Firenze University Press; Roma: Associazione italiana biblioteche, 2003, p. 29-45. Also available as:

<<http://digital.casalini.it/fulltext/is.asp?isbn=888453111X>>

"FRBR: Bringing New Capabilities to the Catalog," interview: Barbara B. Tillett, by Tom Storey. *OCLC Newsletter*, no. 262 (Oct./Nov./Dec. 2003), p. 13-15.

"FRBR e VIAF: Esempi delle attuali iniziative internazionali sulla catalogazione," Barbara B. Tillett. In: *Studi e testimonianze offerti a Luigi Crocetti*, a cura di Daniele Danesi, Laura Desideri, Mauro Guerrini, Piero Innocenti, Giovanni Solimine. Milano: Editrice Bibliografica, 2004, p. 679-692.

*IFLA Cataloguing Principles: Steps towards an International Cataloguing Code*. Report from the 1<sup>st</sup> IFLA Meeting of Experts

- on an International Cataloguing Code, Frankfurt, 2003. Edited by Barbara B. Tillett, Renate Gömpel and Susanne Oehlschläger. München: K.G. Saur, 2004, IV, 286 p. (IFLA Series on Bibliographic Control, vol. 26). ISBN 3-598-24275-1.
- "IFLA Reports from the 2003 World Library and Information Conference, Berlin, August 1-9, 2003. Cataloging Section," William Garrison, Syracuse University; Glenn Patton, OCLC, Inc.; and Barbara Tillett, Library of Congress. Available as: <[http://www.ala.org/Content/NavigationMenu/ALCTS/Publications6/ALCTS\\_Newsletter\\_Online1/Vol\\_14\\_No\\_5/Events\\_IFLA.htm](http://www.ala.org/Content/NavigationMenu/ALCTS/Publications6/ALCTS_Newsletter_Online1/Vol_14_No_5/Events_IFLA.htm)>
- "International Meeting of Experts for an International Cataloguing Code: IME ICC. Report of the 1<sup>st</sup> Meeting, Frankfurt, Germany, July 28-30, 2003," Barbara B. Tillett, and the Working Group Leaders Ann Huthwaite, Claudia Fabian, Renate Gömpel, Gunilla Jonsson, Monika Münnich. *International Cataloguing and Bibliographic Control*, v. 33, no. 2 (April/June 2004), p. 39-44.
- What is FRBR? A Conceptual Model for the Bibliographic Universe*, Barbara Tillett. [Washington, D.C.]: Library of Congress, Cataloging Distribution Service, [1<sup>st</sup> printing Jan. 2004; 2<sup>nd</sup> printing with corrections April 2004]. (Text originally published in *Technicalities*, v. 25, no. 5 (Sept./Oct. 2003); some of the figures printed in slightly different form and in black and white by Kluwer in 2001.)
- "What is FRBR (Functional Requirements for Bibliographic Records)," by Barbara B. Tillett. Presentation to the FRBR-Workshop für Expertengruppenmitglieder, July 8-9, 2004, Die Deutsche Bibliothek, Frankfurt am Main, Germany. Available at: <[http://www.ddb.de/professionell/frbr\\_workshop.htm](http://www.ddb.de/professionell/frbr_workshop.htm)>

## **PERSONNEL**

### **STAFF HONORS**

#### **Margaret Mann Citation, 2004**

Chief Barbara Tillett was awarded the 2004 Margaret Mann Citation, presented by ALCTS/CCS "for her extraordinary contributions to both the theory and the practice of cataloging...in particular...developing and explaining IFLA's Functional Requirements of Bibliographic Records..., implementing the Library of Congress's first integrated library system, spearheading work on the Virtual International Authority File, leading IFLA's efforts to develop an international cataloging code, and contributing substantively to a new edition of the Anglo-American Cataloguing Rules...." The award, presented at a ceremony at the ALA meeting in Orlando in June, is a citation and a \$2,000 scholarship donated in the recipient's honor by OCLC Online Computer Library Center, Inc., to the library school of the winner's choice, which in this case was split between the University of Hawaii and UCLA.

#### **CPSO staff members who received other awards:**

##### **Length of Service Awards**

35 years: Robert Ewald, Nancy B. Jones, Millicent K. Wewerka  
30 years: Marian S. Johnson, Paul G. Weiss  
10 years: Barbara B. Tillett

#### **Details**

##### **To CPSO**

Pat Alexiou (Arts and Sciences Cataloging Division, Romance Language Team; series queries, etc.)  
Marian Davis (Serial Record Division, Cataloging Section II; series queries, etc.)  
Lucas Graves (Special Materials Cataloging Division, Music and Sound Recordings II; series problems and queries)  
Lucas Graves ((SMCD, MSR II; DBIU)  
Marilyn Hargreaves (Serial Record Division; DBIU)  
Elmer Klebs (Serial Record Division, Cataloging Section II; series queries, etc.)  
Anri Kuwatsuki (Arts and Sciences Cataloging Division,

Physical Sciences Team; series queries, etc.)  
Antoinette O'Bryant (Motion Picture, Broadcasting and Recorded  
Sound Division, Processing Unit; DBIU)  
Seanna Tsung (Geography & Map Division, Technical Services  
Section; DBIU)  
Margaret Wayne (Social Sciences Cataloging Division team  
leader; comprehensive survey and assessment of database  
maintenance throughout the Library; identify issues for a  
database maintenance unit in CPSO)

**From CPSO**

Darlene Foster (Preservation and Reformatting Division)  
Dave Reser (from March 15; Office of the Director for  
Cataloging, as acting digital projects coordinator; renewed)

**Staff changes**

Darlene Foster, secretary to the chief, accepted a position in  
the Office of Strategic Initiatives



## APPENDIX I

### PUBLICATIONS

#### From CPSO

*Cataloging Service Bulletin.* quarterly  
*Free-Floating Subdivisions; an Alphabetical Index.* annual  
*Library of Congress Classification*  
KB Religious Law  
LF Law of the United States  
PN Literature (General)  
PQ French, Italian, Spanish and Portuguese Literatures  
Q Science  
*Library of Congress Rule Interpretations.* semi-annual updates  
*Library of Congress Subject Headings.* annual

#### Other internal

*MARC Code List for Geographic Areas.* occasional  
*MARC Code List for Languages.* occasional

#### CPSO Public and Staff Web Pages (new)

Bibliographic Workflow Training Documents - Details Update  
Copy Cataloging Manual, Draft B13, Appendix 2: Data Element Checklist  
Copy Cataloging Manual, Draft B13, Appendix 7: "Encoding-Level 7"  
CPSO Annual Report for Fiscal Year 2003  
CPSO monthly highlights  
Current Library of Congress Rule Interpretations  
DCM C12.5.5a.1)a). Revision  
Descriptive Cataloging Documentation Update  
Descriptive Cataloging Manual - Details Update  
Descriptive Cataloging Manual, E2  
Descriptive Cataloging Manual, E1  
Descriptive Cataloging of East Asian Material: CJK Examples of AACR2 and Library of Congress Rule Interpretations; A Work in Progress  
Draft 3 of LCRI 25.5B on Uniform Titles for Motion Pictures, Television Programs, and Radio Programs  
Government-designated Parks and Forests - Proposed Change in Policy  
Item Record Data Dictionary  
Item Record Data Dictionary, Appendix C: Monographs/Updating Loose-leafs: Indexes and Supplements  
Item Record Data Dictionary, Data Element: Free Text  
Item Record Data Dictionary, Data Element: Caption  
LC ILS Cataloging Handouts - Details Update  
Library of Congress Action Plan to Implement 13-Digit ISBN  
Library of Congress Authority Records on the Web  
Library of Congress Classification Approved Weekly Lists  
Library of Congress Classification Tentative Weekly Lists  
Library of Congress Implementation of the 2004 Update to the 2002 AACR2  
Library of Congress Subject Headings Approved Weekly Lists  
Library of Congress Subject Headings Tentative Weekly Lists  
MARC 21 Documentation Update  
Proposed Romanization Table for Ladino  
Serial Holdings in the LC-ILS  
Shelflisting Documentation Update  
Subclass G (Cartographic Materials) B Geographic Cutter Numbers

(Tables G1548-G9804)  
Subject Cataloging Documentation Update

**Other** (CPSO staff were contributors, reviewers, etc.)

*2004 AACR Concise*

*2004 AACR2 Update*

Proofreaders

PCC training materials on integrating resources

TPAIO handouts for training on shelflisting of analytics

## APPENDIX II

### CPSO STATISTICS, Fiscal Year 2004

<b>Arrearage reduction</b>	
Cataloging for ASCD (encoding level 7 copy cataloging)	
Classification numbers created	7
Subject headings created	29
Titles cataloged	9
Cataloging for HLCD	
Items cataloged	7
Hours spent	4
Cataloging for the Law Library	
Descriptive cataloging	8
Classified/reclassified	14
New inputs	8
Replacement copies added to the general collection	21
<b>Classification Editorial Team</b>	
New and changed classification numbers	2,974
<b>Database Improvement Unit</b>	
BatchCat changes	138,000
<b>Policy Team and Team Leaders</b>	
Authorities (Policy Team)	
Names	1,111
Series	
Authority Records created	64
Authority Records created from information forwarded by PCC libraries	9
Bibliographic records updated for those SARs	604
Authority Records created from information forwarded by LC catalogers	6
Bibliographic records updated for those SARs	87
Bibliographic records simplified	6
Total records updated	604

Correspondence sent	TOTAL	12,479
Within LC		4,476
Outside LC		8,003
CPSO e-mail account messages received		12,015
Weekly average		231
Error reports handled	TOTAL	12,301
Reports from LC		9,192
Reports from outside LC		3,109
Telephone inquiries	TOTAL	1,014
Within LC		915
From outside LC		99
<b>Subject Headings Editorial Team</b>		
New subject headings processed		6,200+
Changed subject headings		6,000
TOTAL transactions		12,200+
Size of database at end of FY		283,500
<b>053 Pilot Project</b>		
Authority records to which 053s added		135
Records otherwise updated		160
<b>Visitors</b>	TOTAL	780
LC		767
From outside LC		13